

KENTUCKY TRANSPORTATION CABINET

Kentucky TRNS*PORT Information Series

SiteManager Materials Module

Sampling & Testing Requirements Window

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General Description

The Sampling and Testing Requirements window allows the identification of materials for a bid item and the specification of a minimum sampling and testing requirements guide. It is used to identify the minimum frequency, responsibilities, sample size, and/or unit for the sampling and testing of a material for a bid item. SiteManager uses this data as a guideline for the entry of new contracts.

Procedure

In KYTC, the SiteManager System Administrator will maintain the data in the Sampling & Testing Requirements window. All requests for new Item Code and Material Code associations or modifications of existing Item Code and Material Code associations and their corresponding sampling and testing requirements should be submitted to the SiteManager System Administrator on the Sampling & Testing Requirements Request Form.

MATERIALS FOLDER TAB

Materials Folder Tab Description

The Material folder tab allows the specification of the conversion factor and approved source required indicator for a selected material on a bid item. If necessary, the Material can also be viewed from this window.

Procedure

In KYTC, the following assumptions should be made in determining Item Code to Material Code associations.

Component Materials and Contractor Options

All possible component materials and Contractor Options that require S&T should be listed for the Bid Item.

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For example, if a Bid Item can have three different types of Fly Ash, then all three types should be listed for the Bid Item in the 'Open' select list.

NOTE: Although not directly part of this windows procedure, on the Contract Sampling and Testing window the DME will delete the materials that do not apply to a specific contract. If there is a possibility that the material will be used on the item at some point in the Contract, the DME should change the conversion factor to zero. If the material ~~does~~ not get is not used by the end of the project, the DME should delete the material code.

Entering Samples as One per Contract

Enter samples that are needed one per Contract as a frequency as 1 per 9,999,999.

NOTE: Although not directly part of this windows procedure, on the Contract Sampling and Testing window the DME will modify to n per n/bid quantity as the frequency as it applies to a specific contract. This will have SiteManager remind you of sampling responsibilities throughout the life of the Contract. For example, if you want to have 4 samples per contract and the bid quantity is 100, then the frequency should be 1 per 25. SiteManager will require one sample for ever 25 units that are installed.

Geotech Bid Items – Embankment in Place and Excavation

Soil and Rock should be listed as a material for Geotech Bid Items with a Conversion Factor of ONE and a testing frequency of ONE per Contract. This S&T Requirement will serve as a reminder that a sample is needed for the Contract.

NOTE: Although not directly part of this windows procedure, on the Contract Sampling and Testing window the DME may modify the frequency and Conversion Factor throughout the life of a contract as needed. If the material (Soil or Rock) is not on the contract, then the material that is not used can be deleted by the DME.

Contractor Option – Precast Concrete and Cast in Place

The Miscellaneous Precast material should be listed as a component material for the Bid Item. The Conversion Factor should be ONE. Instructions on how to modify the conversion factor if precast material is used should be listed in Special Instructions.

The S&T Requirements should be established for both Cast in Place and Precast materials.

NOTE: Although not directly part of this windows procedure, on the Contract Sampling and Testing window the DME will modify the Conversion Factor as necessary based on the specific contract. The DME may delete the Precast material code if it is not used on the contract.

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Lot and Shipment Sampling

For materials that are sampled and tested based on lot or shipment, the Conversion Factor should be ONE and the frequency should be ONE per Contract.

NOTE: Although not directly part of this windows procedure, on the Contract Sampling and Testing window the DME will modify the Conversion Factor and frequency as necessary based on the Contract. For example, for materials sampled by lot, the default S&T Requirements should be ONE per Contract. If another lot is used, then the DME should modify the frequency to be TWO per Contract.

Time Frequency

For materials sampled and tested based on a time frequency, the Conversion Factor should be ONE and the frequency should be ONE per Contract.

NOTE: Although not directly part of this windows procedure, on the Contract Sampling and Testing window the DME will modify the Conversion Factor and frequency as necessary based on the Contract. For example, if the frequency according to the S&T guidelines is one per week for a material, SiteManager should show the S&T Requirements to be ONE per Contract. The DME should determine the number of weeks in the Contract and modify the frequency to reflect the length of the Contract.

Mix Design Items

All Mix Design Bid Items should have all possible component materials, the Mix Design material, and the Mix Design Approval Material Code listed for sampling and testing.

The Mix Design Approval Material Code should have a Conversion Factor of ONE and a frequency of ONE per Contract.

S&T Requirements on component materials that are tested for the purpose of Mix Design approval should not be established.

Mix Design component materials should be established with a Conversion Factor of ONE.

NOTE: Although not directly part of this windows procedure, on the Contract Sampling and Testing window the DME will modify the Conversion Factor and frequency as necessary based on the specific contract. The frequency is based on the item unit. If a material is not used on the Mix Design the material may be deleted. If the material may be used in the future, the DME should change the Conversion Factor to ZERO. As additional mixes are added to the items, the DME should modify the Conversion Factor based on the total quantity used to date. For example, the bid quantity of Item 1000 is 100

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and Mix A uses Flyash for the first 50 units. If Mix B is used for the other 50 units and Mix B uses Cement instead of Flyash, then the Conversion Factor for both component materials (Cement and Flyash) should be modified to 0.5.

Design Build Items (Lump Sum)

These requirements will not be set up in this procedure. The S&T requirements for Design Build Items will be set up based on contract by contract basis in the Contract Sampling and Testing window.

Field Table

Field Label	KYTC Population Policy & Procedure
Item	Displays the unique identifying code for the bid item from the Item Master.
Spec Year	Displays the specification year for the bid item.
Item System Unit	Displays whether the units of measure are English or Metric.
Item Unit	Displays the unit of measure for the <u>pay-bid</u> item.
Description (Lines 1&2)	Displays a description of the selected <u>pay-bid</u> item from the Item Master.
Material Code	Select the Material Code associated to the Item code.
Conversion Factor	Refer to the PROCEDURE description under the Material Tab above for the Conversion Factor of the various <u>classes-of</u> materials in KYTC.
Approved Source Indicator	This field indicates whether or not an approved source from the Approved Materials (i.e. Brand Name Product) functionality must be associated with the material. If the indicator displays a checkmark, the name of an approved product must be entered in the Sample Information window when creating a sample record for the material. Select as applicable.
Special Instructions	This field is a freeform text field intended for the user to type special instruction specific to the <u>pay-bid</u> item to material relationship. The value, if any, will be passed to the Contract Sampling and Testing Requirements window. <ul style="list-style-type: none">- In KYTC this field should include the defaults for how the conversion factor was determined, special instructions for sampling, and whether or not the Contract should be referenced for specific details.- Instructions on how to modify the conversion factor if precast concrete material is used should also be listed in Special Instructions.

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SAMPLE AND TESTING FOLDER TAB

Sample and Testing Folder Tab Description

The Sample and Testing tab allows the modification of a materials sample and testing information for a given bid item.

Procedure

In KYTC, the S&T Requirements should be entered in accordance with the field table definitions below. Additional comments regarding assumptions made in determining the Conversion Factor and/or frequency may be recorded in the Remarks bubble.

Sample Types and Acceptance Methods should be used in determining S&T Requirements as defined below:

- ⁂ Verification – Verification should be chosen as a Sample Type for materials that are sampled for the purpose of retesting questionable material (e.g., Verification samples). Verification should NOT be set up as an S&T Requirement. Possible Acceptance Methods are Test Results.
- ⁂ Independent Assurance – Independent Assurance should be chosen as a Sample Type when materials are sampled for the purpose of meeting Independent Assurance S&T Requirements. The only possible Acceptance Method is Test Results.
- ⁂ Informational – Informational should NOT be set up as an S&T Requirement. This should be chosen on a sample record for samples that are taken for CCRL, AMRL, and for other samples that should not be counted toward Contract S&T Requirements (e.g., New Products or new suppliers). Possible Acceptance Methods are Test Results and Certification.
- ⁂ Mix Design Approval – Mix Design Approval should be chosen as a Sample Type for the Material Code Mix Design Approval and when materials are sampled for the purpose of Mix Design approval. The only possible Acceptance Method is Mix Design Approval.
- ⁂ Project Acceptance – Project Acceptance should be chosen as a Sample Type for materials sampled for the purpose of fulfilling Contract S&T Requirements. Possible Acceptance Methods are Visual Inspection, Test Results, and Certification.

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- n QA– QA should be chosen as a Sample Type for materials sampled for the purpose of Verification of Contractor’s Quality Control Testing. A possible Acceptance Method is Test Results.
- n QC– QC should be chosen as a Sample Type for materials sampled for the purpose of Contractor’s Quality Control Testing. A possible Acceptance Method is Test Results.

Field Table

Field Label	KYTC Population Policy & Procedure
Sample Type	Identifies the type of the test to be performed on the material for the associated paybid item. Select the Sample Type. <ul style="list-style-type: none">- Refer to the paragraph above for the specific combinations of Sample Type and Acceptance Method allowed in KYTC. This is a required field.
Acceptance Method	Identifies how the material will be accepted on the contract. Select the Acceptance Method. <ul style="list-style-type: none">- Refer to the paragraph above for the specific combinations of Sample Type and Acceptance Method allowed in KYTC. This is a required field.
Test Method	Unique identifier of test template that will be used to capture the test data. A full description of the test to be completed will display to the right of the Test Method field. Select the Test Method. This is a required field.
Sample Location	Wherever the Sample Location is available, it should be entered. Selections include Job Site, Plant, and Manufacturer.
Sample Frequency	The rate at which a sample must be collected. Enter the Sample Frequency. <ul style="list-style-type: none">- Refer to the PROCEDURE description under the Material Tab above for the Sample Frequency of the various classes of materials in KYTC.
Sample Size	This field indicates the minimum sample quantity to be collected. Wherever the Sample Size is available, it should be entered.
Sample Unit	The unit of the sample size. Wherever the Sample Unit is available, it should be entered.
Sample Responsibility	The sample responsibility should be indicated as either State or Contractor. This is a required field.
Test Responsibility	The test responsibility should be indicated as either State or Contractor. This is a required field.